

APPLICATION FOR RECORDS DISPOSITION STANDARD
INSTRUCTIONS: Prepare in duplicate and forward to the Records Management Analyst, Management Systems Division

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|--|--|--|--------|------------------------|---|--|--|-------------------|--|----------------|--------------------------|
| 3. Dept., Division, Subdivision & Administering Office Address Transit System Development - MARTA Real Estate Division Program Coordination Branch 2300 Peachtree Summit Bldg. 401 West Peachtree Street Atlanta, Georgia 30365 | | FOR RECORDS MANAGEMENT DIVISION USE <table style="width: 100%; border: none;"> <tr> <td style="width: 33%; border: none;">Date Received</td> <td style="width: 33%; border: none;">Application No.</td> <td style="width: 33%; border: none;">Date Completed</td> </tr> <tr> <td style="border: none;">1-27-81</td> <td style="border: none;">81-76</td> <td style="border: none;">FEB 2 1981</td> </tr> </table> <table style="width: 100%; border: none;"> <tr> <td style="width: 50%; border: none;">1. Application</td> <td style="width: 50%; border: none;">2. Dept. Application No.</td> </tr> </table> | | Date Received | Application No. | Date Completed | 1-27-81 | 81-76 | FEB 2 1981 | 1. Application | 2. Dept. Application No. |
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| 1-27-81 | 81-76 | FEB 2 1981 | | | | | | | | | |
| 1. Application | 2. Dept. Application No. | | | | | | | | | | |
| 4. Person to Contact Deborah Mathis-Browder | | 5. Working Title Program Coordinator | | | | | | | | | |
| 6. Telephone Number 586-5209 | | | | | | | | | | | |
| 7. Action Requested a. <input checked="" type="checkbox"/> Establish Retention Schedule; record will continue to accumulate. b. <input type="checkbox"/> Dispose of present accumulation; no further accumulation anticipated. c. <input type="checkbox"/> Amend Application No. _____ Check One: <input type="checkbox"/> Change; <input type="checkbox"/> Supersede; <input type="checkbox"/> Void | | | | | | | | | | | |
| 8. Dates of Series <table style="width: 100%; border: none;"> <tr> <td style="width: 50%; border: none;">Earliest</td> <td style="width: 50%; border: none;">Latest</td> </tr> <tr> <td style="border: none;">1972</td> <td style="border: none;">Present</td> </tr> </table> | | Earliest | Latest | 1972 | Present | 9. Records Series Title (followed by title used in office, if different) Real Estate Payment Invoice Files | | | | | |
| Earliest | Latest | | | | | | | | | | |
| 1972 | Present | | | | | | | | | | |
| 10. Division and Office Function What is the function of the Division and the Office in which this record series is created? The Division of Real Estate is responsible for acquiring right-of-way needed for development of the transit system, which includes property appraisal, negotiation, acquisition and clearance functions. It is also responsible for relocating displaced families and businesses and for operating a salvage yard. In addition, it manages the Authority's real estate interests, which include station concessions, advertising and disposable properties. | | | | | | | | | | | |
| 11. Record Series Description This file contains the following documents (include form numbers and titles, if any): Attach samples of the file. <table style="width: 100%; border: none;"> <tr> <td style="width: 15%; border: none;">Documents relating to:</td> <td style="border: none;">Requests for payment by invoice and encumbering of funds for future expenditures.</td> </tr> <tr> <td style="border: none;">Included are:</td> <td style="border: none;">Invoices and option folders which indicate that an expense will be incurred in the future. Also included with each invoice, if applicable, is information on property management, demolition, purchase settlements, purchase amounts, severance and restoration, refunds, area manager brokers, tax and other invoice related information.</td> </tr> <tr> <td style="border: none;">File is arranged:</td> <td style="border: none;">Numerically by date payment requested.</td> </tr> </table> | | | | Documents relating to: | Requests for payment by invoice and encumbering of funds for future expenditures. | Included are: | Invoices and option folders which indicate that an expense will be incurred in the future. Also included with each invoice, if applicable, is information on property management, demolition, purchase settlements, purchase amounts, severance and restoration, refunds, area manager brokers, tax and other invoice related information. | File is arranged: | Numerically by date payment requested. | | |
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| 12. Monthly Reference Rate How often are records referred to which are: One to six months old <u>3</u> ; Seven to twelve months old _____ ; Thirteen to twenty-four months old _____ ; twenty-five months and older _____ ? | | | | | | | | | | | |
| 13. Annual Rate of Accumulation of Records Letter-size drawers _____ ; Legal-size drawers <u>1</u> ; Shelves _____ ; Other (specify) _____ | | | | | | | | | | | |

| YES | NO | 14. Questionnaire (Place an "X" in the proper column) |
|-----|----|--|
| X | | a. Is this the official copy of the series? If not, where is it? |
| X | | b. Does the series contain confidential information requiring security handling? If yes, cite law or regulation. <u>U.S. Uniform Relocation & Real Property Acquisition Act of 1970</u> |
| | X | c. Is this a vital record? |
| | X | d. Does this series have historical or long term research value? |
| | X | e. When one or two documents in the file make it necessary to keep the entire file for a long period, could these documents be scheduled separately? |
| | X | f. Is the information contained in this series ever published? If yes, attach copy. |
| | X | g. Is the information contained in this series ever analyzed and/or recorded in a summarized report? If yes, attach copy. |
| | X | h. Is there a duplication of this series in your office, or in another office or agency? If yes, where? <u>(Portions of file information maintained by Accounting)</u> |
| | X | i. Is this series (or a major portion of it) regularly microfilmed? |
| | X | j. Does the record series result in a computer printout? |

15. Retention Requirements

The following requires the series to be kept:

| | | | |
|--------------------------|--------------|-----------------------------------|-----------------|
| a. State Law | _____ years. | d. Audit period | _____ years. |
| b. Statute of limitation | _____ years. | e. Administrative need | _____ years. |
| c. Federal law | _____ years. | f. Federal retention instructions | <u>3</u> years. |

Attach copy or excerpt of laws or regulations. Explain administrative need.

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Hold for three years past the date of the submission of the final Expenditure report.

16. Approved Disposition Instructions

This agency recommends that the file series be cut off at the end of each:

☐ Calendar Year; ☒ Fiscal Year; ☐ Other _____ then,

- ☐ Hold in the current files area _____ month(s) _____ year(s); then
- ☐ Transfer to local holding area; hold _____ year(s); then
- ☐ Transfer to State Records Center; hold _____ year(s); then
- ☐ Destroy.
- ☐ Transfer to State Archives for permanent retention.
- ☐ Other (Specify)

Cut off file at end of each fiscal year; after last expenditure report is recorded; hold in central files area for one year; then transfer to the Authority's Records Center - hold for three years past the date of submission of the final expenditure report; then destroy.

These instructions apply to all prior and future accumulations of the series

(Indicate briefly rationale for recommendations above/or write additional remarks):

17. APPROVALS

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|---|--|
| Approved <i>Kate M. Stebb</i> Date <u>12/17/80</u> | Approved <i>Wayne Crowder</i> Date <u>1/2/81</u> |
| Approved <i>Shirley Chen</i> Date <u>12-22-80</u> | Approved <i>Janice Chalker</i> Date <u>1/8/81</u> |
| Approved <i>W. Brown</i> Date <u>12/29/80</u> | Approved <i>Carroll Hart</i> Date <u>2-2-81</u> |
| Approved <i>Willie Scott</i> Date <u>12/29/80</u> | Approved MARTA Management Advisory Committee Date |